

ISLANDS OF THE BAHAMAS

TOUR OPERATOR & MEDIA SURVEY



**RESEARCH AND STATISTICS DEPARTMENT
MINISTRY OF TOURISM**

2011

1. Why Did Visitors Come to The Bahamas?

- 72% of stopover visitors came to The Bahamas on a vacation;
- 6% came to visit friends & relatives;
- 5% of them came on a business trip and 5% of them came on a honeymoon

2. What Influenced their Decision to Visit The Bahamas?

TOP INFLUENCES FOR DECIDING TO VISIT THE BAHAMAS ISLANDS OF THE BAHAMAS 2011

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Beaches	59.5%	58.4%	59.2%	63.8%
Climate	52.7%	54.6%	45.7%	50.8%
Rest and Relaxation	42.1%	42.3%	42.1%	41.6%
Friendly People	26.5%	25.1%	27.4%	30.6%
Hotel Facilities	24.7%	28.8%	13.5%	18.0%
Never Been Here Before	22.2%	22.3%	24.5%	20.2%
Easy to Get to	21.1%	22.3%	19.4%	17.9%
Safety of Islands	17.6%	16.7%	15.1%	22.9%
Good Package Deals	15.1%	15.8%	20.2%	8.9%
Exotic Islands	14.5%	13.6%	12.8%	18.9%
Friend recommended Bah.	10.8%	10.8%	7.5%	13.1%
Sports	10.4%	7.4%	11.8%	20.5%
Best Value for Money	10.2%	10.4%	14.3%	6.7%
Casinos	9.3%	12.3%	6.2%	0.6%
Heard a lot about Bahamas	8.6%	9.3%	6.9%	7.2%
Had Friends in Bah.	8.5%	7.8%	8.4%	11.5%

Source: Tour Operator and Media Exit Survey 2011

- Six in ten (60%) stopover visitors to the Bahamas were influenced to visit the Bahamas because of the beaches;
- More than half (53%) of them were influenced by the climate;
- Four in ten (42%) stopovers were influenced to visit by the rest and relaxation that they expected to enjoy in the destination;
- 27% of them were influenced to visit by the friendly people.
- 25% of them were influenced to visit by the hotel facilities in the destination;

3. What Activities Did They Intend to Do While in The Bahamas?

- Eight in ten (82%) stopover visitors to The Bahamas intended to enjoy the beaches and seven in ten (72%) intended to rest and relax;
- Approximately one in three (35%) stopovers intended to go shopping;
- One in three (33%) of them wanted to go snorkeling;
- Two in ten (21%) of them wanted to go to the casinos;
- Sporting activities like diving, sailing, deep sea fishing and bone fishing were especially of interest to some of the visitors to the Out Islands

**ACTIVITIES VISITORS INTENDED TO DO ON THIS VISIT TO THE BAHAMAS
ISLANDS OF THE BAHAMAS
2011**

	Bahamas	Nassau/P.I.	Grand Bahama	Out Islands
Enjoy Beaches	82.3%	82.5%	85.0%	79.5%
Rest and Relax	72.4%	73.5%	73.8%	67.7%
Shop	34.8%	36.8%	45.3%	20.3%
Go Snorkeling	32.7%	29.4%	32.9%	44.3%
Go to Casinos	21.2%	26.9%	20.5%	1.2%
Go on Island Tour	16.0%	14.5%	21.6%	17.9%
Go Diving	9.5%	7.2%	11.0%	17.2%
Go Sailing	8.5%	7.1%	8.6%	13.4%
Go Deep Sea Fishing	5.0%	3.8%	6.2%	8.6%
Go Golfing	4.3%	3.5%	4.5%	7.1%
Go Bonefishing	4.2%	2.5%	2.8%	11.4%
Other Activities	3.3%	3.3%	4.6%	2.5%
Go Birdwatching	3.1%	2.8%	3.5%	4.1%
Non Response	5.1%	5.0%	3.8%	6.5%

Source: Tour Operator and Media Exit Survey 2011

4. When Did the Stopover Visitors Make Their Reservations?

**WHEN DID YOU MAKE YOUR RESERVATIONS
STOPOVER VISITORS
2011**

	All Bah.	Nassau/P.I.	Grand Bah.	Out Isl.
Same Week of Travel	7%	7%	11%	7%
Same Month of Travel	16%	17%	17%	13%
1 to 3 Months Before Travel	46%	47%	44%	43%
4 to 7 Months Before Travel	22%	22%	18%	27%
8 to 12 Months Before Travel	5%	5%	5%	7%
More than 12 months Before Travel	1%	0%	3%	2%
Non-Response	2%	2%	2%	2%

Source: Tour Operator and Media Exit Survey 2011

- Stopover visitors to The Bahamas primarily booked their reservations anywhere from the same month of travel to seven months in advance of travel. Almost half (46%) of them booked their reservations one to three months before travel.

5. Did Stopovers Use an Online Service to Book Their Reservations?

- Approximately two in three (65%) stopover visitors to The Bahamas used an online service to book some or all of their reservations in 2011.

a) Which Online Services Were Used Most by Stopover Visitors to The Bahamas?

**MOST POPULAR ONLINE BOOKING SERVICES USED
STOPOVERS TO THE ISLANDS OF THE BAHAMAS
2011**

Atlantis.com	Aeroplan.com	Onetravel.com
Expedia.com	Airmiles.co.uk	Preferredcasinotours.com
Orbitz.com	Americanexpress.com	Rbctravelmanagement.com
Cheapcaribbean.com	Ba.com/britishairways.com	Rci.com
Travelocity.com	Bahamas.com	Redtag.ca
Jetblue.com	Breezes.com	Riu.com
Celebration-cruise-line.com	Cheapflights.com	Selloffvacations.com
Sandals.com	Cheaptickets.com	Sheraton.com
Aa.com	Classicvacations.com	Spiritair.com
Priceline.com	Colpittsworldtravel.com	Starwoodvacationownership.com
Bookit.com	Copaair.com	Tdtravelrewards.com
Delta.com	Fti.de	Travelzoo.com
Westjet.com/westjet.ca	Gobahama.com	Tripcentral.ca
Aircanada.com	Gradcity.com	Tui.com
Usairwaysvacations.com	Hilton.com	United.com
Bahamasair.com	Hotels.com	Vacationstogo.com
Carlsonwagonlit.com	Hotwire.com	Vrbo.com
Itravel2000.com	Interturnet.com.br	Watermakersair.com
Continental.com	Intervalworld.com	Worldtvl.com
Cheapoair.com	Kayak.com	Wyndham.com
Cheaptickets.com	Maritimetravel.ca	Xtremetrips.com

This list is not all-inclusive of every online service used. The 1st column is the top 21 online services the rest are the other top ones listed in alphabetical order. (Source: Immigration Cards and Tour Media Exit Survey, 2011)

6. Did Stopover Visitors to the Bahamas use a Tour Operator/Travel Agent to Book Any of Their Reservations?

- Three in ten (31%) stopovers used a travel agent to book some or all of their reservations in 2011.

**ISLANDS OF THE BAHAMAS
USE OF TRAVEL AGENT
2011**

	All Bahamas		Nassau/P.I.		Grand Bahama		Out Islands	
	2011	2010	2011	2010	2011	2010	2011	2010
Used Travel Agent	31%	33%	32%	34%	30%	34%	28%	28%
Did Not Use Travel Agent	65%	64%	64%	63%	68%	63%	69%	68%
	USA		Canada		Europe		Other Countries	
Used Travel Agent	28%	30%	42%	48%	47%	49%	36%	36%
Did Not Use Travel Agent	68%	67%	55%	50%	50%	49%	59%	58%

Source: Tour Operator and Media Exit Surveys 2011 & 2010

7. What Electronic Media Did Stopover Visitors to The Bahamas Use Most When Planning Their Vacation?

- Approximately eight in ten (82%) stopover visitors used the Internet as the electronic media most frequently used when planning their vacation. Approximately one in ten (9%) stopovers used Network television the most when planning their vacation.

8. What Were the Favorite Television Stations Watched by Stopover Visitors to The Bahamas?

**TOP 15 FAVORITE TELEVISION STATIONS BY VISITORS
ISLANDS OF THE BAHAMAS
2011**

	Bahamas	Nassau/P.I.
1	ESPN	ABC
2	ABC	ESPN
3	NBC	NBC
4	CNN	CNN
5	CBS	FOX
6	FOX	CBS
7	HBO	HBO
8	HGTV (Home & Garden Network)	FOOD (Food Network)
9	FOOD (Food Network)	HGTV (Home & Garden Network)
10	DISC (Discovery Channel)	DISC (Discovery Channel)
11	FOXN	FOXN
12	TNT	TNT
13	MTV (Music Television)	MTV (Music Television)
14	USA	LIFE (Lifetime)
15	LIFE (Lifetime)	BRAVO
	Grand Bahama	Out Islands
1	ESPN	ESPN
2	ABC	NBC
3	CNN	CNN
4	CBS	ABC
5	NBC	FOX
6	FOX	DISC (Discovery Channel)
7	HBO	CBS
8	TNT	FOXN
9	HGTV (Home & Garden Network)	HGTV (Home & Garden Network)
10	FOOD (Food Network)	FOOD (Food Network)
11	DISC (Discovery Channel)	HBO
12	LIFE (Lifetime)	HIST(History Channel)
13	FOXN	NGEO (National Geographic Ch.)
14	TWC (The Weather Channel)	MSNBC
15	TBS	TNT

Source: Tour Operator and Media Exit Survey 2011

9. What Time Were Stopover Visitors Most Likely to Watch Television?

Stopover visitors to the Bahamas were most likely to watch television between the hours of 6 pm to 10:59 pm at night. The hours of 8:00 pm to 8:59 pm were of course prime time and four in ten (43%) stopovers watched television during that time.

10. Did Stopover Visitors Use Print Media When They Were Planning Their Vacations?

Two in ten (21%) stopover visitors to The Bahamas used print media when they were planning their vacations. Of these stopovers almost half (47%) used newspapers and two in three (66%) used magazines.

11. Use of Newspapers

Although only 21% of stopover visitors used print media when planning their vacations, approximately six in ten (63%) stopovers read newspapers for their personal enjoyment and edification.

TOP 20 FAVORITE NEWSPAPERS READ BY VISITORS ISLANDS OF THE BAHAMAS 2011

	Bahamas	Nassau/P.I.
1	USA Today	USA Today
2	New York Times	New York Times
3	Wall Street Journal	Wall Street Journal
4	Daily News	Daily News
5	New York Post	New York Post
6	Other	Globe & Mail
7	Miami Herald	Toronto Star
8	Globe & Mail	Other
9	Toronto Star	Miami Herald
10	Washington Post	Times
11	Boston Globe	Boston Globe
12	Times	Washington Post
13	Local	Newsday
14	Chicago Tribune	Local
15	New York Daily News	New York Daily News
16	Newsday	Chicago Tribune
17	Atlanta Journal Constitution	Atlanta Journal Constitution
18	Sun Sentinel	Sun/The Sun News
19	Sun/The Sun News	Post
20	Post	Sun Sentinel
	Grand Bahama	Out Islands
1	USA Today	New York Times
2	New York Times	USA Today
3	Wall Street Journal	Wall Street Journal
4	Daily News	Washington Post
5	Other	New York Post
6	Miami Herald	Other
7	Globe & Mail	Miami Herald
8	Toronto Star	Daily News
9	Washington Post	Boston Globe
10	New York Post	Times
11	Chicago Tribune	Local
12	Boston Globe	Globe & Mail
13	Times	Chicago Tribune
14	Sun Sentinel	Atlanta Journal Constitution
15	Palm Beach Post	Sun Sentinel
16	Local	Palm Beach Post
17	New York Daily News	Dallas Morning News
18	Atlanta Journal Constitution	New York Daily News
19	Orlando Sentinel	Newsday
20	Denver Post	Denver Post

Source: Tour Operator and Media Exit Survey 2011

12. Use of Magazines

Although only 21% of stopover visitors used print media when planning their vacations nearly seven in ten (68%) stopovers read magazines for their enjoyment.

TOP 20 FAVORITE MAGAZINES READ BY VISITORS ISLANDS OF THE BAHAMAS 2011

	Bahamas	Nassau/P.I.
1	People	People
2	Better Homes & Gardens	Better Homes & Gardens
3	Cosmopolitan (Cosmo)	Cosmopolitan (Cosmo)
4	In Style	In Style
5	Good Housekeeping	Good Housekeeping
6	National Geographic (Explorer)	Men's Health
7	Glamour	Glamour
8	Men's Health	National Geographic (Explorer)
9	Time Magazine	Time Magazine
10	Sports Illustrated	O (Oprah)
11	Food & Wine	Sports Illustrated
12	O (Oprah)	Food & Wine
13	Architectural Digest	Architectural Digest
14	Bon Appetit	Bon Appetit
15	Reader's Digest	Newsweek
16	Economist	Reader's Digest
17	Conde Nast Travel	Economist
18	Newsweek	In Touch/In Touch Weekly
19	In Touch/In Touch Weekly	US/US Weekly
20	Golf Digest	Conde Nast Travel
	Grand Bahama	Out Islands
1	Better Homes & Gardens	People
2	People	Better Homes & Gardens
3	Cosmopolitan (Cosmo)	National Geographic (Explorer)
4	National Geographic (Explorer)	Food & Wine
5	Good Housekeeping	In Style
6	Glamour	Bon Appetit
7	In Style	Architectural Digest
8	Food & Wine	Conde Nast Travel
9	Reader's Digest	Glamour
10	Time Magazine	Economist
11	O (Oprah)	Cosmopolitan (Cosmo)
12	Sports Illustrated	Men's Health
13	Ebony	Time Magazine
14	Men's Health	Good Housekeeping
15	Bon Appetit	Travel & Leisure
16	Woman's Day	New Yorker
17	Architectural Digest	Business Week
18	Golf	Newsweek
19	Essence	Southern Living
20	Business Week	Fly Fishing

Source: Tour Operator and Media Exit Survey 2011

13. How Did Stopover Visitors Rate Their Product Experiences?

PRODUCT SATISFACTION RATINGS 2011

Rating Area	Much Better or Better				Not as Good or Worse			
	The Bah.	Nassau/ P.I.	Grand Bahama	Out Islands	The Bah.	Nassau/ P.I.	Grand Bahama	Out Islands
Hotel Rooms	37%	38%	35%	37%	10%	11%	15%	3%
Food in Hotels	36%	38%	28%	34%	11%	12%	16%	6%
Hotel Service	44%	47%	40%	37%	8%	9%	12%	4%
Value for Money in Hotels	26%	26%	30%	22%	15%	19%	12%	6%
Easy to Get to	40%	40%	44%	35%	7%	7%	8%	8%
Beaches	62%	60%	66%	66%	3%	3%	4%	2%
Climate	54%	54%	55%	54%	6%	6%	8%	7%
Attitude of People	67%	66%	67%	69%	6%	7%	6%	2%
Food in Restaurants	46%	46%	47%	47%	9%	10%	12%	7%
Restaurant Service	45%	45%	47%	44%	10%	10%	11%	7%
Overall Value for Money	32%	31%	38%	35%	16%	17%	14%	11%
Bahamas Overall	62%	60%	62%	66%	4%	4%	6%	2%

Research & Statistics Dept., Ministry of Tourism, includes cruise stopover visitors e.g. Bah. Celebration Ship in GBI
Source: Tour Operator and Media Exit Survey 2011

- Six in ten (62%) stopover visitors thought that The Bahamas overall was much better or better than they had expected it to be. Stopovers to the Out Islands gave higher ratings than those to Nassau/Paradise Island and Grand Bahama on the overall Bahamas experience.
- The Out Islands received higher ratings than Nassau/Paradise Island and Grand Bahama on attitude of the people.
- A higher percentage of stopover visitors to Grand Bahama rated the island worse than those to Nassau/Paradise Island and the Out Islands on hotel rooms (15% vs. 11% and 3%), hotel food (16% vs. 12% and 6%), and hotel service (12% vs. 9% and 4%).
- The Bahamas did not receive very high ratings on hotel value for money (only 26% or one in four stopovers thought it was MB or B), or overall value for money (only 32% or one in three stopovers thought it was MB or B).

14. What Were the Top Compliments and Complaints Given by Stopover Visitors to The Bahamas?

TOURIST COMMENTS POSITIVE VS. NEGATIVE COMMENTS ALL BAHAMAS

TOP 6 COMPLIMENTS	TOP 6 COMPLAINTS				
	2011	2010	2011	2010	
General	38%	39%	Prices (neg)	16%	13%
People	27%	27%	Hotel (neg)	10%	10%
Scenery/Sightseeing	7%	8%	People (neg)	9%	9%
Beaches	5%	5%	Food (neg.)	7%	7%
Hotel	3%	2%	Service (neg)	6%	7%
Weather/Climate	3%	2%	Litter (neg)	5%	7%
No. of Comments	2,614	2,855	No. of Comments	987	1,571

15. Visitor Demographics

DEMOGRAPHIC & PSYCHOGRAPHIC PROFILE ISLANDS OF THE BAHAMAS

	2011	2010
MAIN PURPOSE OF VISIT		
Vacation	72%	73%
Business	5%	5%
Honeymoon	5%	5%
Visiting friends and relatives	6%	5%
DECISION TO VISIT INFLUENCED BY:		
Beaches	60%	60%
Climate	53%	51%
Rest and Relaxation	42%	41%
ACTIVITIES VISITORS INTENDED TO DO		
Enjoy Beaches	82%	83%
Rest and Relax	72%	74%
Shop	35%	36%
Go Snorkeling	33%	33%
Go To Casinos	21%	22%
Go on Island Tour	16%	16%
LIKELY RETURN IN 1-5 YEARS	88%	86%
LIKELY RECOMMEND TO FRIENDS/REL	94%	92%
USED ONLINE SERVICE TO BOOK	65%	74%
USED TRAVEL AGENT	31%	33%
AGE*		
25 - 54 years old	54%	54%
55 years old or older	21%	20%
SEX*		
Male	48%	48%
Female	48%	49%
RACE		
White	80%	80%
Black	8%	7%
Hispanic	4%	4%
Mixed Race/Mixed Heritage	3%	3%
Asian/Pacific Islander	3%	3%
American Indian/Alaska Native	0%	0%
Other	0%	1%
EDUCATION		
College Graduate or Above	66%	66%
ANNUAL HOUSEHOLD INCOME		
\$25,001 to \$50,000	9%	8%
\$50,001 to \$75,000	11%	11%
\$75,001 or more	54%	56%
PREVIOUS VISITS		
First Time Visitor	41%	40%
Repeat Visitor	58%	59%
TRAVELLING PARTY SIZE		
One	18%	15%
Two	39%	41%
Three or more	37%	38%
HOUSEHOLD SIZE		
One	12%	13%
Two	40%	38%
Three-Four	34%	34%
COUNTRY OF ORIGIN		
USA	79%	80%
Canada	9%	9%
Europe	6%	6%
Other Countries	6%	6%
AVERAGE LENGTH OF STAY	6.8 nts.	6.7 nts.

*Information on age, sex and avg. length of stay were obtained from immigration card data.
Source: Tour Operator and Media Exit Survey 2011

All information in this brochure is based on the Tour Operator & Media Exit Survey 2011.

Research and Statistics Department

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www.Tourismtoday.com and www.bahamas.com